

HSA Application & Salary Reduction Agreement

This Salary Reduction Agreement (SRA) authorizes your employer to reduce your salary by the indicated amount shown below for the exclusive purpose of facilitating a contribution to your Health Savings Account through your Cafeteria Plan. **Do Not Send Contributions With This Form.**

By completing this agreement, you are indicating that as of the effective date of your contribution election, you are an "Eligible Individual" as defined in the adoption agreement and authorize your employer to facilitate your monthly contributions to your HSA on your behalf.

Instructions

*Are you a current HSA Account Holder?

☐ **Yes** Fill out only your name in section 1 and proceed to sections 2 through 5.

☐ **No** Complete ALL required information, marked with an asterisk (*) on both sides and sign the form. Look in the mail for your HSA Welcome Packet, which includes additional HSA services.

1

Account Holder Information (Please Print)

*Required Field

*Name: (First) _____ (MI) _____ (Last) _____

*Preferred Mailing Address: ☐ Home Address ☐ Mailing Address (if different than Home Address)

*Home Address: _____ Mailing Address: _____

City: _____ City: _____

State: _____ Zip: _____ State: _____ Zip: _____

*Preferred Phone Number: ☐ Home ☐ Work

*Home Phone: (____) _____ - _____ Work Phone: (____) _____ - _____

If we need to reach you what is the best time to call: _____ ☐ AM ☐ PM

*Email Address: _____

*Date of Birth: _____ *Social Security Number: _____

*Driver's License Number: _____ *Mother's Maiden Name (security): _____

*Employer: _____

2

HSA Contribution Election

I elect a monthly contribution of \$ _____ to my HSA effective _____
Amount Date

Attention current MSA or HSA account holder with accounts at other financial institutions, please remember that the total annual contributions to all accounts may not exceed federally mandated limits.

HSA Application & Salary Reduction Agreement cont.

3

HDHP Information

Coverage Date: _____ Check One: ☐ Single Coverage ☐ Family Coverage

4

mySourceCard® Debit Card

☐ I hereby request a mySourceCard™ MasterCard® debit card as an alternate distribution method from my HSA account. I understand that additional fees may apply. (See Article IV of the Custodial Account Agreement for terms of usage.) Print exactly as you would like it to appear on your card. 21 characters maximum, including spaces. If additional cards are needed, please include a separate sheet(s).

Name on 1st Card:

Name on 2nd Card:

5

Adoption Agreement / Employee Signature

As of the effective date of my HSA Contribution Election, I certify that I am an "Eligible Individual" as defined by the Code and do hereby elect a Health Savings Account in accordance with Section 223 and Section 125 of the Internal Revenue Code. I understand this request will not be processed until all paperwork is completed, accepted and approved by my employer. I further understand that I am responsible for all contributions made to my HSA and that DataPath Administrative Services, Inc. is facilitating but not initiating the contribution.

This application is for the establishment of my individually owned Health Saving Account at the custodian displayed below. The information on this application is true and accurate to the best of my knowledge and I submit this form with full understanding and acceptance of the provisions contained within the Custodial Account Agreement, HSA Terms and Conditions Statement and the HSA Disclosure Statement. I also acknowledge that the Plan Service Provider (PSP) indicated on the bottom of this form is authorized to perform transactions on my account and all such transactions initiated by the PSP should be treated as if initiated directly by me, the Account Holder. I am currently, or will be upon the date of my first contribution, an eligible individual as described in the Custodial Account Agreement. I understand that maintaining my eligibility is my responsibility and that the custodian will assume that all contributions are made while I am eligible to do so. I am currently, or will be upon the date of my first contribution, covered by a High Deductible Health Plan that meets the qualifications detailed in the Custodial Account Agreement.

*Signature of Account Holder: _____ Date: _____

Employer Signature

The employee's election of the Health Savings Account Contribution is accepted as of the date shown below.

*Authorized Signature: _____ Date: _____

Custodian

National Advisors Trust Company, FSB
10881 Lowell Avenue, Suite 100 • Overland Park, KS 66210

Plan Service Provider

DataPath Administrative Services, Inc.
Serial Number: 666576474227
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